

# Dynix Circulation User's Guide

These are the update pages for the *Dynix Circulation User's Guide*. The update pages are temporary and will be integrated into the manual in a later release.

Use these instructions to insert the update pages in the manual:

## **Chapter 2, Searching**

Insert pages 2-1 through 2-14 behind the Searching tab.

## **Chapter 4, Checkout**

Insert pages 4-1 through 4-8 behind the Checkout tab.

## **Chapter 5, Checkin**

Insert pages 5-1 through 5-8 behind the Checkin tab.

## **Chapter 8, Holds**

Insert pages 8-1 through 8-16 behind the Holds tab.

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This document is compatible with Dynix Release 190. It may also be compatible with later releases.

July 31, 2002 2:32 pm

Part #: 317190-117190

# Searching

This update section explains the Circulation-related tasks that patrons can do in Public Access.

Insert these pages behind the Searching tab in the *Dynix Circulation User's Guide*.

|  |      |
|--|------|
| <b>Viewing or Changing Circulation and Patron Information from Public Access</b> | 2-3  |
| <b>Checking Out an Item from Public Access</b>                                   | 2-4  |
| <b>Viewing Full Bibliographic Information for Items Still Checked Out</b>        | 2-5  |
| <b>Viewing Full Bibliographic Information for Items On Hold</b>                  | 2-7  |
| <b>Viewing Information about Renewed Items</b>                                   | 2-8  |
| <b>Changing the Activation Date of a Hold</b>                                    | 2-10 |
| <b>Viewing Accruing Fines</b>  | 2-12 |
| <b>Adding or Updating a Patron's E-mail Address</b>                              | 2-14 |





## Viewing or Changing Circulation and Patron Information from Public Access

You and your library's patrons can now use Public Access to check out items and to view or change a variety of circulation-related information for each patron. (For example, patrons can view bibliographic information about items they have on hold, or view the fines they owe for items currently checked out.)

Your system administrator determines whether these functions are available to you and your library's patrons. (For more information, see "Other Public Access Options" in the "Searching Setup" chapter of the *Dynix SA Guide*.)

This update section explains how to:

- Check out an item from Public Access
- View full bibliographic information for items still checked out
- View full bibliographic information for items on hold
- View information about renewed items
- Change the activation date of a hold
- View accruing fines
- Add or update a patron's e-mail address

## Checking Out an Item from Public Access

Traditionally, patrons take items to a circulation desk to have library staff check them out. However, your library can choose to let patrons check out items on their own using Dynix Public Access at a library terminal. Your library can choose which PTYPEs can have this option.

Patrons check out items from Public Access through the Review Patron Record menu option. While some patrons may find this feature on their own, you may need to teach patrons how to use this feature. You may also want to make a scanner available to let patrons scan the barcode of each item they check out.

Your system administrator must activate the option to let patrons check out their own items before your patrons can use it. (For instructions, see “Letting Patrons Check Out Items through Public Access Self-Checkout” in the release 190 update pages for the “Circulation Setup” chapter of the *Dynix SA Guide*.)

### To check out an item from Public Access

- 1 Access the search menu in the Public Access module.
- 2 Enter the line number for Review Patron Record.
- 3 Enter your library barcode number.
- 4 Enter the line number that lets you check out items.

#### NOTE

If Dynix displays any exception message or block, you cannot check out the item in Public Access. Until the message or block is removed, you must check out the item at the Circulation desk.

- 5 Do one of these options:
  - If your library has a scanner available for patrons, scan the barcode of each item you want to check out.
  - Search for the item and choose it from the list.
  - Use the keyboard to enter each item’s barcode manually.

Dynix displays the title, due date, and due time of each item as it is checked out.

**NOTE**

If you check out more items than Dynix can display on one screen during the current session, and if you want to see the list of items again, you can return to the Review Patron Record menu and choose the option to list the items that you have checked out. When you choose this option, Dynix shows all items that you have checked out, not just those that you checked out during this session.

- 6 Enter “.Q” to quit.

## Viewing Full Bibliographic Information for Items Still Checked Out

Patrons can view bibliographic information for any number of items they currently have checked out. The system administrator determines whether or not Dynix displays this information in the patron record in Public Access. (For instructions on displaying items still out, see “Other Public Access Options” in the “Searching Setup” chapter of the *Dynix SA Guide*.)

### To view full bibliographic information for items still checked out

- 1 Access the search menu in the Public Access module.
- 2 Enter the line number for Review Patron Record.
- 3 Enter the patron’s library barcode number.
- 4 Enter the line number that lets you see the items the patron has checked out.

Dynix displays a list of items the patron currently has checked out.

**NOTE**

If the patron has no items checked out, Dynix displays a message. Press RETURN to clear the message. Then enter the line number for "Quit" to return to the Search menu. Skip the remaining steps.

5 Enter "BD" (Bib Display).

6 Do one of these options:

- To display information for one or more items, enter the line number of each item for which you want information.  
(For example, enter "1,3-5".)
- To display information for all items, enter "A" (All).

Dynix displays the full bibliographic details of the first item you chose.

7 If you entered more than one line number, do these steps to move between items in the list:

| To move to the next item  | To move to the previous item   |
|---|--|
| <p>1 Enter "NT" (Next Title).</p> <p>2 If you reach the last item in the list and Dynix asks if you want to start the display again, do one of these options:</p> <ul style="list-style-type: none"> <li>• To display the first item in the list, enter "Y".</li> <li>• To display the last item in the list, enter "N".</li> </ul> | <p>1 Enter "PT" (Previous Title).</p> <p>2 If you reach the first item in the list and Dynix asks if you want to go to the end of the list, do one of these options:</p> <ul style="list-style-type: none"> <li>• To display the last item in the list, enter "Y".</li> <li>• To display the first item in the list, enter "N".</li> </ul> |

8 To return to the list of items out, enter "B" (Back) or "SO" (Start Over).

- 9 Do one of these options:
  - To return to the Review Patron Record menu, enter “B” (Back).
  - To return to the search menu, enter “SO” (Start Over).

## Viewing Full Bibliographic Information for Items On Hold

Patrons can view full bibliographic information for each item they have on hold. The system administrator determines whether or not Dynix displays this information in the patron record in Public Access. (For instructions on displaying items on hold, see “Other Public Access Options” in the “Searching Setup” chapter of the *Dynix SA Guide*.)

### To view full bibliographic information for items on hold

- 1 Access the search menu in the Public Access module.
- 2 Enter the line number for Review Patron Record.
- 3 Enter the patron’s library barcode number.
- 4 Enter the line number that lets you view holds.

Dynix displays a list of items the patron has on hold.

#### NOTE

If the patron has no items on hold, Dynix displays a message. Press RETURN to clear the message. Then enter the line number for “Quit” to return to the Search menu. Skip the remaining steps.

- 5 Enter “BD” (Bib Display).
- 6 Enter the line number of the item for which you want information.

You can enter only one number at a time.

Dynix displays the full bibliographic details of the item you chose.

- 7 To return to the list of items on hold, enter “B” (Back) or “SO” (Start Over).
- 8 If you want to view the bibliographic details for another item you have on hold, repeat steps 5 through 7 until you finish reviewing the items on hold.
- 9 Do one of these options:
  - To return to the Review Patron Record menu, enter “B” (Back).
  - To return to the search menu, enter “SO” (Start Over).

## Viewing Information about Renewed Items

Patrons can view the number and type of renewals they have made on each item that they currently have checked out. (Library staff can view this same information from Checkout. For more information, see “Tracking a Renewal” on page 4-4 of this version 190 update.)

The system administrator determines whether or not Dynix displays this information in the patron record in Public Access. (For instructions on displaying items still out, see “Other Public Access Options” in the “Searching Setup” chapter of the *Dynix SA Guide*.)

### To view information about renewed items

- 1 Access the search menu in the Public Access module.
- 2 Enter the line number for Review Patron Record.
- 3 Enter the patron’s library barcode number.
- 4 Enter the line number that lets you see the items the patron has out.
- 5 Enter “LR” (List Renewals).

Dynix displays a screen that includes information about renewals:

The first number shows the total number of times the patron has renewed this item, whether in person with the item present or in any other way.

The second number shows the total number of renewals allowed for this item.

| 1 | BARCODE    | TITLE                           | DATE | TOTAL | TEL | SELF |
|---|------------|---------------------------------|------|-------|-----|------|
| 1 | 00387 7197 | Arabic thought and its place in |      | 1/1   | 0   | 0    |

07 SEP 2001      DYNIX LIBRARY SYSTEMS      09:45am  
Public Access Catalog      UV Port 15

REVIEW PATRON RECORD

BOECKER, RANDY

Quit :

The total number of renewals made when the item is not present, including renewals made by telephone, by TeleCirc, or at the circulation desk.

The number of renewals made from a self-checkout terminal.

(For more information on this screen, see “Tracking a Renewal” on page 4-4 of this release 190 update.)

- 6 Enter “Q” to Quit.
- 7 Do one of these options:
  - To return to the Review Patron Record menu, enter “B” (Back).
  - To return to the search menu, enter “SO” (Start Over).

## Changing the Activation Date of a Hold

If a patron has an item on hold but finds that the item is not needed right away, you or the patron can defer that hold from Public Access. This means the hold becomes inactive until the date that is entered. (For example, if the patron plans to be out of town, the patron can postpone the hold until after he or she returns.) In addition, if the activation date for a deferred hold is near and the patron knows the item is not yet needed, or needs it sooner than was thought at first, the patron can change the activation date.

A patron can also reactivate or “undefer” a previously deferred hold. This makes the hold active as of the date it is reactivated. (For example, if the patron finds the item is needed sooner than the deferral date that was entered previously, the patron can reactivate the hold from Public Access.) (For information on changing hold dates from Circulation, see “Viewing or Changing the Activation Date of a Hold” on page 8-14 of this 190 update.)

### To change the activation date of a hold

- 1 Access the search menu in the Public Access module.
- 2 Enter the line number for Review Patron Record.
- 3 Enter the patron’s library barcode number.
- 4 Enter the line number that lets you view holds.
- 5 Do one of these options:
  - If you want to defer a hold or change the deferral date on a previously deferred hold, enter “D”.
  - If you want to reactivate a hold, enter “UN” (UNdefer).  
(This option may display on the second screen of commands after you choose “O” [Other commands]. However, the command does not need to display on the screen for you to enter it.)
- 6 Enter the number of the hold you want to defer or reactivate.  
If necessary, use the RETURN (Next Screen) and “P” (Previous Screen) commands to move through your list of holds.
- 7 If you are deferring a hold or changing the deferral date on a hold, enter the date when Dynix should activate the hold.

Dynix treats the hold as if you placed it on the date you enter, or the date you reactivate it.

Dynix displays the list of holds showing these updates:

For a deferred hold, Dynix displays a "D" in the "St" column.

```

REVIEW PATRON RECORD
UNFILLED Hold Requests for:

BOECKER, RANDY

# BIB Key Title Placed/Expire Pkup Q-Pos St
11 203353 The Stand (Complete and 10 SEP 01/09 MAR 02 BML 1/1 D
12 133201 The subject of tragedy / 10 SEP 01/09 MAR 02 BML 1/1 C3

Select an option below :
SO=Start Over, B=Back, P=Previous Screen, <Enter>=Next Screen, ?=Help
C=Cancel a hold, HS=Hold Status, BD=Bib Display, D=Defer, O=Other commands
    
```

For a reactivated hold, Dynix displays the hold type in the "St" column. (For more information on hold types, see "Placing Batch Holds" on page 8-3 in this release 190 update.)

- 8 Repeat steps 6 and 7 for any other holds whose activation dates you want to change.
- 9 To return to the search menu, enter "B" (Back) or "SO" (Start Over).

## Viewing Accruing Fines

Patrons can view their current fines for any item that they still have checked out. (Previously, patrons could view fines for only those items that they had already returned.)

When patrons view items that they have checked out, they can choose to view the fine for each overdue item and the total amount of fines. The fine balance may increase daily, depending on your library policy and on how soon the patron returns the items.

The system administrator determines whether Dynix displays this information in the patron record in Public Access. (For more information, see “Letting Patrons View Fines in Public Access” in the release 190 update pages for the “Searching Setup” chapter of the *Dynix SA Guide*.)

### To view current fines

- 1 Access the main menu in the Public Access account.
- 2 Enter the line number for Review Patron Record.
- 3 Enter the patron’s library barcode number.
- 4 Enter the line number that lets you see items checked out to the patron.  
Dynix displays the items you currently have checked out.
- 5 Enter “FA” (Fines Accrued).

Dynix displays the patron's current fine balance:

If the patron checked out the item using public access, an asterisk displays in this column.

26 SEP 2001 DYNIX LIBRARY SYSTEMS 03:12pm  
Public Access Catalog UV Port 14

HALLS, JOLYNN REVIEW PATRON RECORD

| 2   | BARCODE | TITLE                     | DUE DATE  | TIME      | LIB      | OI     |
|---|---------|---------------------------|-----------|-----------|----------|--------|
| *****"Fines as of 26 SEP 01 03:16pm"***** |         |                           |           |           |          |        |
| >   |         |                           |           |           |          | >      |
| >   |         | Title                     | Out Date  | Due Date  | Due Time | Fine   |
| >   |         | Silent coup : the removal | 14 AUG 01 | 01 SEP 01 | *        | \$1.50 |
| >   |         | The firm /                | 20 AUG 01 | 08 SEP 01 | *        | \$1.50 |
| >   |         |                           |           |           |          |        |
| >   |         |                           |           |           |          | \$3.00 |
| *****                                     |         |                           |           |           |          |        |

Press <Enter>.

This list shows the title of each item still checked out.

The original checkout date and due date.

The total amount of fines that the patron currently owes.

6 Press RETURN.

Dynix returns to the list of items still checked out.

7 Enter "Q" to quit.

## Adding or Updating a Patron's E-mail Address

Patrons can add, view, or edit their own e-mail addresses in Public Access. Dynix displays messages at the bottom of the screen to help the patron complete these tasks.

### NOTE

A patron cannot access his or her patron record by doing this task. A patron can update only the e-mail address field of the patron record.

Your system administrator determines whether this option is available to patrons. (For instructions, see "Activating E-mail Registration (UPP)" in the 190 update pages for the "Searching Setup" chapter of the *Dynix SA Guide*.)

### To add or update a patron's e-mail address

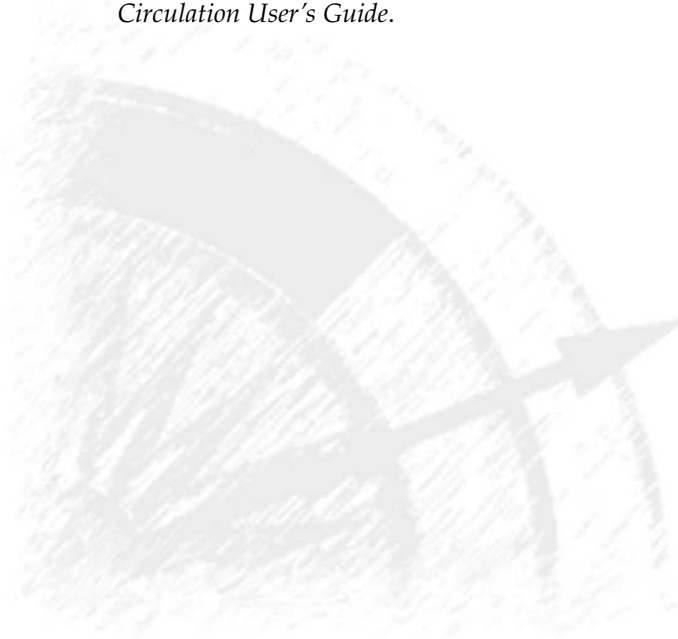
- 1 Access the search menu in the Public Access module.
- 2 Enter the line number for Review Patron Record.
- 3 Enter the patron's library barcode number.
- 4 Enter the line number that lets you add or update a patron's e-mail address.
- 5 Enter the line number for EMAIL ADDRESS.
- 6 Enter the patron's full e-mail address, including the domain name.  
(For example, enter "JWilson@hotmail.com".)
- 7 Press RETURN.
- 8 Enter "S" to save the e-mail address.
- 9 Enter "Q" to quit.

# Checkout

This update section explains additional options available from a list of items checked out to a patron (for example, from the .L [List] command) in Checkout. It also explains how to change an item's due date when it conflicts with a patron record expiration date and how patrons can check out items through public access.

Insert these pages behind the Checkout tab in the *Dynix Circulation User's Guide*.

|   |            |
|---|------------|
| <b>Displaying Information About Items Checked Out to a Patron</b>         | <b>4-3</b> |
| <b>Coordinating an Item Due Date with a Patron Record Expiration Date</b> | <b>4-7</b> |
| <b>Checking Out an Item through Public Access</b>                         | <b>4-8</b> |





## Displaying Information about Items Checked Out to a Patron

You can now do these additional tasks from a list of items checked out to a patron:

- Display ITYPE instead of due time
- Track a renewal
- Use additional options from the .L command

---

### Displaying ITYPE Instead of Due Time

When Dynix displays a list of items that have been checked out, it also displays a column for each hourly loan's due time. If an item does not have a due time, your system administrator can set up Dynix to display the item's ITYPE instead. Displaying the ITYPE can remind you not only of the item type itself (such as book or video tape) but also of the circulation rules that apply to a specific item type.

For example, the due time column displays when you enter a .L (List) command in Checkout. Dynix can replace this column with one containing the item's ITYPE. This can help if the patron has an overdue item they have forgotten about and needs reminding of the medium so he or she can more easily locate it at home. (For instructions on setting up this feature, see "Displaying ITYPE Instead of Due Time in a List of Items" in the release 190 update pages for the "Circulation Setup" chapter of the *Dynix SA Guide*.)

## Tracking a Renewal

Dynix tracks the number and type of renewals that a patron has made on each item they have checked out. You can view this information from Circulation.

### To track renewals

- 1 If you are not already there, access the list of items checked out to a patron.  
(For instructions, see “Listing Items Checked Out to a Patron” in the “Checkout” chapter of the *Dynix Circulation User’s Guide*.)
- 2 Enter “LR” (List Renewals).

Dynix displays a checkout and renewal screen:

The number of renewals made when the item is not present, including renewals made by telephone, by TeleCirc, or at the circulation desk

The number of renewals allowed when the item is not present

The item's due date

These items have not yet been renewed.

Quit :

The total number of times the patron has renewed this item, whether in person with the item present or in any other way

The total number of all kinds of renewals allowed for this item. If the MAX # RENEWALS field on the ITYPE record is blank, Dynix uses the number of renewals allowed for this patron's PTYPE.

The number of renewals made from a self-checkout terminal

The number of renewals allowed from a self-checkout terminal

| 4 | BARCODE  | TITLE                        | REN DATE    | TOTAL | TEL | SELF |
|---|----------|------------------------------|-------------|-------|-----|------|
| 1 | -2497 39 | The seeress of Kell /        | 10 JUN 2002 | 3/5   | 1/2 | 1/2  |
| 2 | -2497 43 | The seventh commandment /    | 10 JUN 2002 | 3/5   | 1/2 | 1/2  |
| 3 | -2497 40 | Damage : a novel /           |             |       |     |      |
| 4 | -2497 57 | Silent coup : the removal of |             |       |     |      |

**NOTE**

To find out the number of renewals made at the library circulation desk for an item, subtract the numbers in the TEL and SELF columns from the first number in the TOTAL column.

- 3 Enter "Q" to Quit.

---

## Using Additional Options from a List of Items Checked Out

When Dynix displays a list of items checked out to a patron (for example, when you use the .L (List) command), you now have more command options. You can choose to view full bibliographic details of items checked out, and view fines for overdue items that are still checked out. (For information about other commands, see "Displaying Information About Items Checked Out to a Patron" in the "Checkout" chapter of the *Dynix Circulation User's Guide*.)

### To use additional options from a List of Items Checked Out

- 1 Access the list of items checked out to a patron.  
(For instructions, see "Listing Items Checked Out to a Patron" in the "Checkout" chapter of the *Dynix Circulation User's Guide*.)

- 2 Do one of these options, depending on the information you want to view:

| <b>To view full bibliographic details of chosen items</b>  | <b>To view all overdue items</b>   |
|--|--|
| <ol style="list-style-type: none"> <li>1 Enter "BD" (Bib Display).</li> <li>2 Enter the line numbers of the items whose bibliographic details you want to view (for example, enter "1,3-5".)<br/>Dynix displays the bibliographic details of the first item you chose.</li> <li>3 Use the "NT" (Next Title) and "PM" (Previous Title) commands to move from record to record.<br/><br/>(For more information, see "Viewing Full Bibliographic Information for Items Still Checked Out" on page 2-5 of this 190 update.)</li> </ol> | <ol style="list-style-type: none"> <li>1 Enter "FA" (Fines Accrued).<br/><br/>Dynix displays a list of all overdue items, including each item's checkout date, due date, due time (if any), and the amount a patron owes for overdue items they have not returned. The system calculates the amount the patron would be charged if they return the items immediately. It does not include any other charges.</li> <li>2 Press RETURN.</li> </ol> |

- 3 Enter "Q" to return to the list of items checked out to the patron.

## Coordinating an Item Due Date with a Patron Record Expiration Date

If you try to check out an item to a patron whose library card will expire before the item that the patron wants to check out is due, Dynix interrupts the checkout process. Previously, you could choose to not check out the items to the patron, or to proceed with the checkout and then either renew the patron's library card or manually change the item's due date to a date before the patron's library card would expire. Now, Dynix gives you another choice: You can choose to make the item due at the same time the patron's library card expires.

### To coordinate an item due date with a patron record expiration date

- 1 Scan a patron's barcode (or otherwise identify a patron in Checkout).

(For instructions, see "Checking Out Items" in the "Checkout" chapter of the *Dynix Circulation User's Guide*.)

If the patron's library card will expire before the item's default due date, Dynix displays a message telling you that the card expires before the item due date.

- 2 Do one of these options:

- If you want to make the item due on the same date that the patron's library card expires, enter "E" (Expiration date).  
Use this option if you do not plan to renew the patron's library card, but still want to check out the item to the patron.
- If you want to check out the item and let Dynix generate the regular due date, enter "N" (Normal due date).

Use this option if you plan to renew the patron's library card after you check out the item, or if you want to manually change the item's due date. (For instructions on renewing a library card, see "Renewing an Expired Library Card (CKO)" in the "Patrons" chapter of the *Dynix Circulation User's Guide*. For instructions on manually changing an item's due date, see "Changing an Item's Due Date in Checkout" in the "Checkout" chapter of the *Dynix Circulation User's Guide*.)

- If you do not want to check out the item to the patron, enter “Q” (Quit).

Dynix returns you to the main Checkout screen.

## **Checking Out an Item through Public Access**

Your library can now choose to let patrons check out items on their own using Dynix Public Access at a library terminal. Your library can choose which PTYPEs can have this option. (For more information, see “Checking Out an Item from Public Access” on page 2-4 of this version 190 update and “Letting Patrons Check Out Items through Public Access Self-Checkout” in the 190 update pages for the “Searching Setup” chapter of the *Dynix SA Guide*.)

# Checkin

This update section explains how to display the number of items still checked out to a patron from the Checkin screen. It also explains other patron-specific tasks you can do quickly from Checkin and a new message that may display at Checkin.

Insert these pages behind the Checkin tab of the *Dynix Circulation User's Guide*.

|   |     |
|---|-----|
| <b>Displaying the Number of Items Still Checked Out to a Patron</b>   | 5-3 |
| <b>Switching to a Specific Patron Information Screen from Checkin</b> | 5-3 |
| <b>Resolving Checkin Messages</b>                                     | 5-8 |





## Displaying the Number of Items Still Checked Out to a Patron

Dynix can display the number of items still checked out to a patron when you scan the barcode of an item during checkin. If the patron has no items checked out other than the one you check in, no message displays.

Your system administrator must set up this feature. (For instructions, see “Displaying the Number of Items Still Checked Out to a Patron” in the release 190 update pages for the “Circulation Setup” chapter of the *Dynix SA Guide*.)

## Switching to a Specific Patron Information Screen from Checkin

After you check in an item from a patron, you can now use shortcuts to switch to various information screens for that patron. This means you do not have to switch to Checkout, identify the patron, and then access the screen. Instead, Dynix displays the screen you want, specific to the patron, immediately after you enter the shortcut. Once you switch to the information screen, you can do all the tasks that you could do if you accessed the screen from Checkout.

You can use the new shortcuts to access these screens for a specific patron:

- Checkout and renewal
- Patron registration
- List of items checked out
- Patron record

### NOTE

If the patron has a block, the Current Blocks screen displays when you enter one of the shortcuts. You must clear the block or override it to continue.

If you use any of these shortcuts without checking in an item, or after checking in an item that was not out, Dynix takes you to the main Checkout and Renewal screen as if you had entered the .C command. You should not use this feature at Checkout because it creates a log that may lock your system if it becomes too large.

### To switch to a specific patron information screen from Checkin

- 1 Check in an item from a patron.
- 2 If you want to access a specific patron information screen, do one of these options:
  - To go to the patron's Checkout and Renewal screen, enter ".CP" (Checkout Patron).

Dynix displays the Checkout and Renewal screen and includes the patron's information:

The screenshot shows a terminal window with the following text:

```
11 SEP 2001           Bush Memorial Library           12:48pm
                   Circulation                       UV Port 15

BOECKER, RANDY           2 3124 0000 0555           23

  BARCODE      TITLE                DUE DATE      TIME
                <-- ENTER BARCODE
```

(For information about the tasks you can do from this screen, see the "Checkout" chapter of the *Dynix Circulation User's Guide*.)

- To go to the Patron Registration screen for the patron, enter ".CPA" (Checkout Patron Assign).

Dynix displays the Patron Registration screen and includes the patron's information:

|                     |                       |                |           |                |
|---------------------|-----------------------|----------------|-----------|----------------|
| 11 SEP 2001         | Bush Memorial Library | 12:52pm        |           |                |
|                     | Circulation           | UV Port 15     |           |                |
| PATRON REGISTRATION |                       |                |           |                |
| BOECKER, RANDY      | 2 3124 00000 0555     | 23             |           |                |
| 1                   | BARCODE               | DATE ACTIVATED | DATE LOST | CURRENT STATUS |
| 1                   | 23124000000555        | 11 SEP 2001    |           | ACTIVE         |

Add barcode, Lost#, Found#, Quit:

(For information about the tasks you can do from this screen, see "Working with Library Cards and Patron Barcodes" in the "Patron" chapter of the *Dynix Circulation User's Guide*.)

- To go to a list of items the patron currently has checked out, enter “.CPL” (Checkout Patron List).

Dynix displays the list of items currently checked out to the patron and includes the patron’s information:

|  |                                      |                                 |           |      |     |
|--|--------------------------------------|---------------------------------|-----------|------|-----|
| 11 SEP 2001  | Bush Memorial Library<br>Circulation | 12:52pm<br>UV Port 15           |           |      |     |
| BOECKER, RANDY   | 2 3124 00000 0555                    | 23                              |           |      |     |
|  | BARCODE                              | TITLE                           | DUE DATE  | TIME | LIB |
| 1  | 00387 7197                           | Arabic thought and its place in | 07 SEP 01 | *    | BML |
| 2  | -2497 50                             | There are no children here /    | 07 SEP 01 | *    | BML |
| Quit, Renew, Lost, Claim Return, Change due date, SStatus, Call#/Price,<br>DaMaged, Original checkout Date#, List Renewals, >=More |                                      |                                 |           |      |     |

(For information about the tasks you can do from this screen, see “Listing Items Checked Out to a Patron” in the “Checkout” chapter of the *Dynix Circulation User’s Guide* and “Displaying Information about Items Checked Out to a Patron” on page 4-3 of this release 190 update.)

- To go to the Patron Record of the patron, enter “.CPM” (Checkout Patron Modify).

Dynix displays the Patron Record:

```

                                     PATRON RECORD
Enter PATRON ID : 23
1 PATRON NAME          BOECKER, RANDY
2 PATRON LOAN TYPE     Staff
3 PATRON PROFILE
4 BARCODE              1/ 23124000000555
5 BIRTHDATE
6 STREET              1/ 400 W. DYNIX DR.
7 CITY, STATE         Provo, UT
8 ZIP CODE            84604
9 HOME PHONE          223-5699
10 STAT CLASS         1/ Staff
11 ID #              1/
12 ALT ADDRESS        1/
13 ALT CITY, STATE
14 ALT ZIP CODE
15 ALT PHONE          1/
16 EMAIL ADDRESS
17 GUARDIAN
=== more data ===
# , File, Quit, Delete, Update(#), <Enter> :
```

(For information about the tasks you can do from this screen, see “Updating a Patron Record [CKO, UPR]” in the “Patrons” chapter of the *Dynix Circulation User’s Guide*.)

When you finish the task, Dynix may automatically return you to Checkout. If it does not, enter “Q” (Quit) or “.C”.

## Resolving Checkin Messages

You may see a new message at Checkin that prompts you to check the condition of an item. Use this table to resolve the message:

| <b>Message</b>                                | <b>What it means</b>   | <b>What to do</b>  |
|---|--|--|
| Check condition before shelving<br>ENTER "C". | You are checking in an item that has been circulated a certain number of times determined by your system administrator. You need to check the condition of the item. | 1 Press "C".<br>2 Follow your library's procedure to check the condition of the item.<br><br>(For example, you can review a paperback for a torn cover, or set aside a video tape for cleaning.) |

# Holds

This update section describes enhancements that have been made to Dynix's holds function. It also explains additions to the command options available from the .HL command in Checkout.

Insert these pages behind the Holds tab in the *Dynix Circulation User's Guide*.

|  |             |
|--|-------------|
| <b>Placing Batch Holds</b>                                 | <b>8-3</b>  |
| <b>Changing the Weight or Cascade Order of a Hold</b>      | <b>8-12</b> |
| <b>Deferring a Hold</b>                                    | <b>8-13</b> |
| <b>Using Additional Options from a Patron's Holds List</b> | <b>8-16</b> |





## Placing Batch Holds

When you or a patron wants to save titles found during a search, you or the patron can add them to a bibliography. (For more information, see “Saving Titles in a Bibliography Using Saved Bib” and “Saving Titles in a Bibliography Using Saved Bib List Manager” in the “Searching” chapter of the *Dynix Circulation User’s Guide*.) Your system administrator can set up Dynix to let you place batch holds on the items in your own or a patron’s saved bibliography.

Additionally, if your library maintains best-seller lists in Public Access, you can place a batch hold on titles a patron wants from a best-seller list. (For example, a patron may want to place holds on all the “Harry Potter” books by J.K. Rowling.)

### NOTE

Patrons *cannot* place their own batch holds in Public Access.

In general, Dynix treats batch holds like any other hold. When you view the holds queue, a plus sign ( + ) shows which holds you placed as part of a batch.

Your system administrator can make these types of batch holds available:

- **All titles.** This lets you choose to place holds on all the items in a saved bibliography or best-seller list at the same time.
- **Cascaded.** This lets you choose the order in which Dynix fills the holds. Dynix fills each cascaded hold in the order requested, regardless of when the items actually become available. You might find this hold type useful if your patrons want to place holds on multi-volumed works. That way, they can get the first volume first, the second volume second, and so forth.

In the holds queue, a cascaded hold displays the letter “C” plus the order number it holds in the queue. Dynix includes a cascaded hold in the queue with all other holds, according to the date each hold was placed. The cascaded hold moves up the queue as Dynix fills each hold that has an earlier date. However, if a hold from the same cascade but with an earlier cascade number has not been checked out to the patron that requested it,

Dynix makes the later cascaded hold inactive for that patron. The later cascaded hold remains inactive at the top of the hold queue until Dynix fills the cascaded holds that come first. (For example, if a patron has not checked out C1 but C2 is at the top of the queue, Dynix holds C2 inactive until the patron checks out C1. Then Dynix activates C2. Dynix does not fill the request for C2 until C1 is filled, even if C2 is checked in and available.) If you or the patron cancel a cascaded hold, Dynix fills the next hold in the cascade. (For example, if you cancel C2, then Dynix fills C3.)

Your system administrator can limit the number of cascaded holds that you can make for a single patron. (For instructions, see “Letting Staff Place Batch Holds” in the release 190 update pages for the “Circulation Setup” chapter of the *SA Guide*.)

You can change the order of a cascaded hold after it is placed. (For more information, see “Using Additional Options from a Patron’s Holds List” on page 8-16 of this 190 update.)

- **First available title only.** The first item from the batch to become available fills the hold. You might find this type of hold useful if the patron wants any item on a specific subject, or any title by a specific author.

After the first item fills the hold, Dynix cancels all other holds placed in the batch. Dynix does this during the first Day End Process that runs after Dynix fills the hold. Dynix also places a PURF block on the patron’s record (Unfilled hold canceled) so that you and the patron know Dynix canceled the hold.

- **Subject.** This lets you choose items from a bibliography or best-seller list to place on hold. From this smaller list, you then tell Dynix how many of the items your patron wants to receive. Dynix notifies you when that many items become available and cancels the rest of the holds.

For example, you could have a bibliography list of 15 items. You choose six of those items to place on hold. Dynix asks how many of those items you want to receive, and you enter “4”. Dynix notifies you when the first four items of the six you placed on hold become available, and cancels the holds on the remaining two items.

You might find this type of hold useful if the patron wants to review the bibliography list and limit holds to the titles most valuable for a specific project.

- **Weighted.** This lets you assign a “weight,” or number, to each of the titles in a saved bibliography or best-seller list that you want to place on hold. Weighting implies that an item with a higher number is more valuable to the patron than another, since one item with a weight of ten can fill the hold request and cancel all the other requests while it would take several items with lower weights to fill the same request. You might find this type of hold useful in an academic environment when professors assign reading lists to their students, and the students have a deadline by which time they must have read something from the list. A weighted list lets the student assign a greater weight to the items they would prefer to read, and a lower weight to second and third choices. The student would then have the chance to wait for the higher weighted items but if time grew short could still read a second or third choice item if it came available before the first choice item did.

In the hold queue, weighted holds display the letter “W” plus the weight number assigned them. Once the weighted total of the filled holds reaches ten, Dynix cancels the rest of the holds. Dynix does this during the first Day End Process that runs after the weighted hold total of ten is reached. Dynix also creates a PURF block on the patron’s record (Unfilled hold canceled) so that you and the patron know Dynix canceled the hold.

Here are some examples of how weighted holds might work:

- A patron can choose to have five holds, each with a weight of two. Dynix can fill all five holds before the maximum number of ten is reached.
- A patron can choose to have five holds, each with a weight of five. Two holds will fill the weight maximum of ten. After Dynix fills two holds, it cancels the rest of the holds.

- A patron can choose to have three holds, one with a weight of five, one with a weight of eight, and one with a weight of three. The holds with the weights of five and three would fill the batch hold, or the hold with a weight of eight would fill it. If Dynix fills the hold in either of these two ways, it cancels all other holds because filling them would exceed the maximum weight of ten.

You can change the weight of weighted holds after they are placed. (For more information, see “Using Additional Options from a Patron’s Holds List” on page 8-16 of this release 190 update.)

The types of batch holds you can make depend on these things:

- What types of holds your system administrator has added to the agency record. (For more information, see “Choosing Batch Hold Types to Allow at an Agency” in the release 190 update pages for the “Circulation Setup” chapter of the *Dynix SA Guide*.)
- What types of batch holds your system administrator has allowed based on the patron type’s priority and the priority of the hold type. (For more information, see “Setting Up Batch Hold Priorities” in the release 190 update pages for the “Circulation Setup” chapter of the *Dynix SA Guide*.)

Your system administrator can also limit the number of batch holds you can make for any patron type. (For instructions, see “Setting Up Batch Hold Priorities” in the release 190 update pages for the “Circulation Setup” chapter of the *Dynix SA Guide*.)

## To place batch holds

- 1 Do one of these options:
  - To place a batch hold from a saved bibliography, do these steps:

### To use a saved bibliography

- 1 Do one of these options:
  - Enter "SBLIST" (Save Bibliography LIST manager) at any system menu, bib summary screen, full bib display, or copy status screen.
  - Choose "Print Saved Bibliography" at a search menu. At the displayed window, enter "3" (SB LIST manager), if it is an option; otherwise, enter "SBLIST".
- 2 If prompted, enter the patron's barcode number and PIN. Dynix displays the Save Bib List Manager screen. This list displays bibliography lists that have been saved to this patron ID. However, it does not include bibliographies created with Saved Bib. To add those bibliographies to this list, you must copy them into Saved Bib List Manager. (For instructions, see "Copying a Bibliography into Saved Bib List Manager" in the "Searching" chapter of the *Dynix Circulation User's Guide*.)

#### NOTE

When you copy a saved bib list into the Saved Bib List Manager, Dynix assigns it a new number. Use the new number if you want to add or delete titles from the list.

- 3 Enter the line number of the list from which you want to place batch holds. Dynix displays the titles on the list.

- To place a batch hold from a best-seller list, do these steps:

| To use a best-seller list   |
|---|
| 1 Enter "S" (Search) at any Circulation menu.   |
| 2 Enter the number for the Best-Seller Lists search option.   |
| 3 Enter the line number for the best-seller list that you want.<br>Dynix displays the titles on the list. |

- 2 Enter the command for placing a hold.  
Your library may use commands such as "R" (Reserve), "S" (Select), or "PH" (Place Hold). Your system administrator can change the key command and description. (For instructions, see "Changing the Command for Placing Holds (UHM)" in the "Other Searching Screens" section of the "Searching Setup" chapter in the *Dynix SA Guide*.)
- 3 If prompted, enter the patron's barcode number and PIN.
- 4 Enter the line number of one of these batch hold types:
  - **All titles.** Dynix lets you choose to put all the items on the bibliography list on hold.
  - **Cascaded.** Dynix lets you choose the order in which the patron wants the items held. This also determines the order in which the patron is notified that the items are available.
  - **First available title only.** Dynix fills the hold request with the first item on the bibliography list that becomes available. It then cancels holds on all other items in the list.
  - **Subject.** Dynix lets you choose which items on the list the patron wants to place on hold.
  - **Weighted.** Dynix lets you give each item on the list a weight. It fills the patron's holds as they become available, but will fill holds only until the weight totals equal ten. After that, Dynix cancels all other holds you placed during the weighting session.
- 5 Follow the same patron notification and pickup location entry steps that you would for any hold.

(For instructions, see steps 3 through 6 of the “Placing a Hold” task in the “Holds” chapter of the *Dynix Circulation User’s Guide*.)

- 6 Press RETURN to use the default activation date, or enter a new date on which to activate the hold.

(For more information on deferring a hold, see “Deferring a Hold” on page 8-13 of this release 190 update.)

- 7 Follow the same expiration date and message entry steps that you would for any hold.

(For instructions, see steps 7 and 8 of the “Placing a Hold” task in the “Holds” chapter of the *Dynix Circulation User’s Guide*.)

Dynix checks all of the items in the saved bibliography for availability. If Dynix thinks an item in the list of titles is on the shelf or if the patron is already in the hold queue for that item, it lists the item on the screen.

- 8 If Dynix lists an item on the screen, do one of these options:

- Enter “B” (Back) to continue.
- If you cannot find any copies of the item, change the item’s status to “Trace.”

(For instructions, see “Placing a Hold After Changing an Item’s Status to ‘Trace’” in the “Holds” chapter of the *Dynix Circulation User’s Guide*.)



- 12** Enter “F” to file your selection.

**NOTE**

If the number of holds you have chosen cannot be placed (for example, if you have exceeded the maximum number of holds allowed), Dynix returns you to the list of items to modify your selection.

Dynix informs you that you are about to place a certain number of reservations.

- 13** Enter “C” to continue.
- 14** If you chose a subject hold, enter the number of titles you require.  
Dynix returns you to the bibliography list or best-seller list.
- 15** Enter “B” (Back) to return to the Saved Bib List Manager screen or the Best-Seller Lists search option screen.
- 16** Enter “Q” to quit.

## Changing the Weight or Cascade Order of a Hold

After you have placed weighted batch holds, you can change the weight of individual weighted hold items in the hold queue. You can also change the cascade order of cascaded holds after you have placed these kinds of holds. (For more information on weighted or cascaded holds, see “Placing Batch Holds” on page 8-3 of this release 190 update.)

### To change the weight or cascade order of a hold

- 1 Do one of these options:
  - Access the holds queue for the item.  
(For instructions, see “Accessing the Holds Queue for an Item” in the “Holds” chapter of the *Dynix Circulation User’s Guide*.)
  - Access the list of holds for a patron.  
(For instructions, see “Accessing the List of Holds for a Patron” in the “Holds” chapter of the *Dynix Circulation User’s Guide*.)
- 2 Enter “W” (Weight/Cascade).
- 3 Do one of these options:
  - Enter a number for the new weight.  
A weight should be a number from 1 to 10. Remember that once the total weight of the items placed on hold equal ten, Dynix cancels all other holds placed in the batch.
  - Enter a number for the new cascade.  
You cannot use the same cascade number twice in the same cascaded hold. (For example, you cannot have two holds in the same cascade with the number 3.) If you are reordering a cascade, you may need to move an item to a higher number and then back to its new position to avoid using the same number twice.
- 4 Enter the line numbers of the hold requests for which you want to make the change.
- 5 Enter “Q” to quit.

## Deferring a Hold

When you place a hold of any kind, you can defer the hold to a later date. You can do this when you initially place the hold or later, from the list of patron holds. (For example, you can defer a hold if the patron does not need the item immediately or is not available to pick it up during a certain time period, but does not want to cancel the hold and place it again later.)

When you defer a hold, Dynix does not activate the hold until the date you enter. (For example, if you place a hold on June 10 but your patron will be out of town until June 20, you can defer the hold until June 20. Dynix activates the hold on June 20.)

You can defer an existing hold. Patrons can also defer holds from Public Access. (For instructions, see “Changing the Activation Date of a Hold” on page 2-10 in this release 190 update.)

This section explains these topics:

- Deferring a Hold During Hold Placement
- Viewing or Changing the Activation Date of a Hold

---

## Deferring a Hold During Hold Placement

During the hold placing process, Dynix prompts you to enter a date on which to activate the hold. You can accept the default date by pressing RETURN. If you enter a new date, Dynix places the hold but does not activate it. When the date you entered arrives, Dynix activates the hold and treats it like any other hold. (For more information on placing holds, see “Placing Holds” in the “Holds” chapter of the *Dynix Circulation User’s Guide*.)

Dynix displays deferred holds like any other hold. You can cancel them like any other hold.

---

## Viewing or Changing the Activation Date of a Hold

You can defer a hold that you have previously placed, or change the deferral date for a previously deferred hold. This means that Dynix will not activate the hold until the new date you enter. You can also reactivate a deferred hold before the deferral date.

Patrons can also perform these tasks from Public Access. (For more information, see “Changing the Activation Date of a Hold” on page 2-10 of this release 190 update.)

### To view or change the activation date of a hold

- 1 Access the list of holds for a patron.  
(For instructions, see “Accessing the List of Holds for a Patron” in the “Holds” chapter of the *Dynix Circulation User’s Guide*.)
- 2 Do one of these options:
  - If you want to view a hold date, defer a hold, or change the deferral date on a previously deferred hold, enter “D”.
  - If you want to reactivate a hold, enter “UN” (UNdefer).
- 3 Enter the number of the hold you want to view, defer, or reactivate.
- 4 If you are deferring a hold or changing the deferral date on a hold, enter the new activation date for the hold.

Dynix displays the list of patron holds showing these updates:

For a deferred hold, Dynix displays a "D" in the "St" column.

```

12 SEP 2001          Bush Memorial Library          10:21am
                   Circulation                    UV Port 11
CHECKOUT & RENEWAL

                   UNFILLED Hold Requests for:
                   BOECKER, RANDY

# BIB Key  Title                               Placed/Expire      Pkup  Q-Pos  St
11 203353  The Stand (Complete and  10 SEP 01/09 MAR 02 BML  1/1  D
12 133201  The subject of tragedy /  10 SEP 01/09 MAR 02 BML  1/1  H

Hold Status, Modify expiration date #, Review queue #, Cancel #, Up,
>=More
    
```

For a reactivated hold, Dynix displays the hold type in the "St" column. (For more information on hold types, see "Placing Batch Holds" on page 8-3 of this 190 update.)

5 Enter "Q" to quit.

## Using Additional Options from a Patron's Holds List

When you display a patron's holds list, Dynix now gives you these additional command options:

| <b>If you want to do this</b>                                     | <b>Do this at the patron's hold list</b>   |
|---|--|
| Display the bib record of a specific item being held              | Enter "BD" (Bib Display).<br>Dynix displays a new screen containing the full bibliographic details of the item you chose. You can do the normal bib display tasks from this screen that relate to this item. (For example, you can check the copy status, save this title to a list, and place holds.) |
| Read any message that was entered at the time the hold was placed | Enter "MS" (MeSsage) followed by the line number of the item whose message you want to read (for example, enter "MS3").<br>If no message was entered, Dynix displays "No Hold Message."  |